

# LAW OFFICES OF JEFFREY B. KAHN, P.C.

WALNUT CREEK      SAN FRANCISCO      SAN JOSE      FAIRFIELD      MARIN COUNTY

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## ESTATE AND TAX PLANNING QUESTIONNAIRE

In order to aid our analysis of your estate, please complete this questionnaire and submit it to our office along with a copy of your prenuptial agreement, if applicable, and a copy of all Wills and Trusts currently in force.

Your Name: \_\_\_\_\_ Spouse's Name: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Birthdate: \_\_\_\_\_ Occupation: \_\_\_\_\_ Birthdate: \_\_\_\_\_ Occupation: \_\_\_\_\_

Work Telephone Number: \_\_\_\_\_ Work Telephone Number: \_\_\_\_\_

Cellphone Number: \_\_\_\_\_ Cellphone Number: \_\_\_\_\_

U.S. Citizen (Yes/No) Divorces/Previous U.S. Citizen (Yes/No) Divorces/Previous

Marriages: \_\_\_\_\_ Marriages: \_\_\_\_\_

State of Domicile: \_\_\_\_\_ Date & Place of Marriage: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_

Zip Code: \_\_\_\_\_ Home Telephone Number: \_\_\_\_\_ Email: \_\_\_\_\_

Facsimile: \_\_\_\_\_ How Long At Present Address: \_\_\_\_\_ Previous Address: \_\_\_\_\_

How Did You Reach Us? Google Yahoo Yellowpages.com Other: \_\_\_\_\_

## CHILDREN

Name	Address (if different from your residence)	Birthdate	Special Circumstances

OTHER ISSUES AND RELATIONS

Name	Address (if different from your residence)	Birthdate	Relation

OTHER BENEFICIARIES

Name	Address (if different from your residence)	Birthdate	Relation

PROFESSIONALS (include address and telephone number)

Accountant: \_\_\_\_\_

Investment Advisors: \_\_\_\_\_

Please answer YES or NO to the following questions:

Do you or your spouse lack a Will executed in California?	
Value of you and your spouse's estate greater than \$3,500,000?	
Either spouse own any interest in a closely-held business?	
Either spouse own real estate located outside of California?	
Do you or your spouse own assets in one name only without any "in trust for" or other beneficiary designation?	
Does either spouse own life insurance or annuities?	
Does either spouse participate in a pension plan or IRA?	
Do you and your spouse differ as to the ultimate disposition of the estate?	
Do you or your spouse have children from a prior marriage?	
Any children or other heirs of either estate that are minors?	
Either spouse concerned over the ability of any heir to adequately manage his or her inheritance?	
Either spouse desire to disinherit a child?	
Does any family member have creditor problems, disability, history of substance abuse or pending divorce?	
Does either spouse desire to accumulate funds for retirement?	
Does either spouse desire to accumulate funds for any family member's college education?	
Has either spouse been diagnosed or currently suffers from a condition that contributes to the incompetency or the decline of said spouse's life expectancy?	
Is either spouse responsible for an elderly or disabled family member's care?	
For any Wills executed by either spouse, has your underlying facts and circumstances changed since their execution?	

Does either spouse lack a Living Will?	
Either spouse wish to make charitable or anatomical gifts?	
Does either spouse wish to qualify for Medicaid?	
Is either spouse not a U.S. citizen?	
Is either spouse concerned over any creditor exposure of their assets including assets jointly held with non-spouses?	
Is either spouse concerned about the surviving spouse's ability to manage the estate or prospect to remarry?	

**FIDUCIARIES**  
(Who will administer your estate?)

	Husband	Wife
Personal Representative		
Successor Personal Representative		
Trustee		
Successor Trustee		
Alternate Successor Trustee		
Guardian of Minor Children		

**DIVISION OF ESTATE**

Husband's Assets to: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Husband's Specific Bequests/Devises \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Wife's Assets to: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Wife's Specific Bequests/Devises \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_



ANNUITIES

Description	Owner	Beneficiary Designations	Value
Total Net Value:			

RETIREMENT ACCOUNTS

Description	Owner	Beneficiary Designations	Value
Total Net Value:			

LIFE INSURANCE

Insurance Company/ Type of Policy (Term, Universal, etc.)	Owner	Beneficiary Designations	Death Benefit	Net Cash Surrender Value
Total Net Value:				

INTERESTS IN CLOSELY HELD OR FAMILY OWNED BUSINESS

Description	Ownership	Value
Total Net Value:		

OTHER ASSETS

(Loans Receivable, Vehicles, Artwork, Collectibles and Other Tangible Personal Property)

Description	Ownership	Net Value
Total Net Value:		

TOTAL NET VALUE OF ESTATE: \$ \_\_\_\_\_

ASSETS NOT OWNED BY YOU BUT SUBJECT TO POWER OF APPOINTMENT HELD BY YOU

Description of Assets	How Assets Held & Date Power Acquired	Value